

## "Profhack" strategies for the busy academic: some personal reflections

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Personal productivity advice has become big business, especially in the corporate world and high-tech community. Technology professionals have embraced the personal "hack," or "workaround" culture, turning their natural problem-solving orientation toward their own work practices. Academic professionals are intellectual entrepreneurs who need these productivity skills as much as anyone but don't often share these workflow practices with each other, as indicated by the relative lack of academic participants in the numerous online productivity forums. Our productivity routine becomes, like teaching often is, one of those "black boxes" that we keep to ourselves.

Here I review the special challenges we face in the academic world in keeping up with our professional demands, put them in the context of the larger productivity conversation, and share some of the technology tools that I've found useful. My emphasis is on the daily needs we have in common in staying organized and keeping up with the workflow, leaving aside the more specific pedagogical, and scholarly skills specific to our fields. As I take stock and update my own routines at the beginning of a new year, and after three recent office moves that forced some organizing and down-sizing, it's helpful to compare notes on best practices in hopes that it will stimulate learning from each other. There's no reason to repeat what is widely available elsewhere, so I will list products mentioned and make general comments about each. The "ProfHacks" column in the *Chronicle of Higher Ed* is a valuable resource for these kinds of issues.

I've always been interested in how to get myself better organized, with better time management and the latest technology that promised to make me more efficient. As one of the first of my grad school cohort to write a dissertation with a word-processor (!), I had to walk to the university computer center to use the mainframe terminal but it greatly speeded up the process. My first organizational tool was a large desktop blotter-style calendar and a chalkboard on the office wall, on which I listed my research projects with a current action alongside them. Later I adopted the Daytimer notebook system, then a computer-based calendar, then PalmPilot, replaced now by a combination of software and platforms: the office-only desktop giving way to the laptop, iPad, and iPhone. With mixed success I've tried to save time where I can to make more room for the tasks I enjoy. The explosion of information, the pace of life, and the always-on nature of work now make this challenge more urgent. Email is a familiar example of the pressures of the workplace that threaten creative space. As widely observed, technology merges the domains of workplace and home, making it necessary to find "life" strategies that cover activities, both at home and at work, wherever and whatever we're doing, and reduce the friction in shifting from one domain to another. Even just the past few years have brought major changes in the technology of productivity, which even the most committed Luddites must engage at some

level if they are to remain competitive.

Living in a network society means participating in multiple levels of connectivity as we receive information, make sense of it, and contribute ourselves to the conversation. That's always been the case, but the difference now lies in the intensity and volume of that communication. And previously our information strategies were more institutionally oriented; that is, we relied more directly on a core of institutional authorities to help organize our information for us. As a long-time subscriber to the *New York Times* (paper edition) I feel increasingly guilty at not reading the entire newspaper, as an institutional guide, and my other reading is less centered solely on books and a few key journals. Instead, practical necessities have led me to develop my own networks tailored to my individual needs, and less organized around a few key institutional outlets. That's just one personal model of the larger forces rearranging our lives, which makes information-taming and productivity skills all the more urgent.

### General organizing strategy

The first thing needed, more than ever, is a general, personal organization strategy. Successful academics are by nature self-starters, or else they don't thrive in the often ambiguous environment of scholarly creativity. But even those accustomed to goal setting and self-direction need to pay attention, lest the new demands in the workplace undermine the very source of our success: ideas and discovery. Thus, one of the critical strategies is to have a general system for helping balance immediate and long-term activities, building in time for personal renewal and planning. Stephen Covey made a fortune with his book, *Seven habits of highly effective people*, but it provided good advice for working on setting priorities, keeping things in balance, and finding time to "sharpen the saw." More recently, David Allen's "Getting things done" system, through books, and related seminars and software support, has become highly popular (even cult-like), especially at the middle-management level where the volume of workflow is great, coming from all sides--and from top and bottom.

The GTD system is not widely embraced by academics, judging again from the kind of people attending Allen's seminars and weighing in on podcasts and online forums. (Georgetown professor Cal Newport, "Study hacks" blogger, is a prominent exception). But it has much to recommend it to the academic, and I've tried to implement aspects of it. The system is easily explained but difficult to implement if not fully engaged. Basically, life can be divided into "projects," defined as any activity that requires more than one action. Thus, identifying those projects and the "next action" item in each helps define and move things along. Classes and papers are the natural "projects" in academia, but they extend to much more than that. A crucial insight of Allen (borrowed from cognitive psychology) is that by relentlessly capturing and organizing the tasks and commitments that are "on our mind" into a trusted system, we free our minds for more creative work. The email analog of this idea is "in-box zero," where email is processed, deleted, dealt with, delegated or deferred into the trusted system for later action. Regular reviews (weekly, monthly, etc.) of the projects ensure that they are lined up with one's areas of focus and long-range goals.

## Scholarly challenges

Translating these general productivity principles into the academic context has caused me to think about our particular setting, infrastructure and nature of intellectual labor. The workplace is highly mobile, of course, as indicated by the shrinking size of typical faculty offices and more use of the "third places," like Starbucks, for doing work. As a practical matter that makes it essential to have a system with computer devices, and tools that can sync across locations. Academic work is highly varied, shifting between class preparation, teaching, research, and more administrative tasks, making it often difficult to keep a consistent routine. Sales people, for example, do certain things in great volume: phone calls, contacts, reports--which particularly benefit from a consistent system. In my own case, in shifting between domains and seasons of the academic calendar, I find it more difficult to stay faithful to a regular system.

Although we're entrepreneurial we also do significant work in teams with colleagues, and must participate in the same bureaucracies faced by other information workers. As administrative pressures take more time, the routines associated with other office workers threaten to pull on us, impose their own template, and limit the kind of quality creative work we need to succeed. Intellectual labor is our focus, even as the demands on our attention have exploded. Thus, the main challenge lies in setting long-term goals, preserving creative spaces, capturing and growing intellectual fruit. In doing so, we must engage with social networks, sharing our work and receiving comments back, in ways much different than in years past. Graduate students, and perhaps many faculty, often have been anxious about their ideas being pilfered if made public, but the risk of this is relatively small compared to the benefits of engaging in this conversation. It goes against the grain of years past, when only after publication was it time to promote the fruits of the labor. Now that is happening before, during and after the publication process.

## Whenever/wherever

The whenever-wherever online world has made in short order some basic tools necessary to work effectively, which I review next. Of course, for keeping work securely backed up "Dropbox" has become a standard tool, which also facilitates the sharing across multiple platforms. That multi-site syncing is a must to allow working wherever and whenever the need arises. The important thing is to exploit the ability to take advantage of those otherwise unproductive spaces in the day, or double up on blocks of time (e.g., exercising while listening to Podcasts), while preserving those other creative spaces from distractions by keeping a clear set of goals in mind.

## General organization

The key task for anyone's productivity is getting better organized overall. That requires finding a trusted system and committing to it so that habits will develop, and we're certain where to look for the things we need. As my work has moved more and more online, I still at times find myself wondering where an important piece of information is stored (physical files--rarer, or increasingly on my computer). And even online, information is still stored

across multiple applications, so they need to be coordinated with a consistent system. "Evernote" has quickly become a valuable tool (and emerging standard) in helping organize all the details of life, syncing and making searchable across multiple platforms. Notes can take the form of written notes, pictures, Pdfs, web clippings, audio files, etc. My internet browser is set up with an Evernote button to permit quick clipping of information I want to save, or I can email something to Evernote and sort it out later. Tips for using Evernote are easily found online, but again there appear to be relatively few academic advocates sharing their routines so there doesn't appear to be any one strategy. In any case, ways of using Evernote will be unique to each user, but I've been using it myself to keep track of information I think may be valuable for classes and various research projects, in addition to things like travel, setting up a separate notebook for each trip and saving to it copies of airline and hotel reservations, emails from colleagues with phone numbers and addresses, and conference agendas or programs.

Once the raw materials, details of life, and general resources have been safely stored away, we need to find a way to keep track of our project agenda. For me the system is "OmniFocus," an OSX product developed with GTD in mind (I've heard that "Things" does something similar). (Some use Evernote to keep track of to-do lists, but I've found it easier to keep the "To Do" world separate from the "Keeping track of" world, the things I'll do vs. the things I have.)

OmniFocus allows syncing across devices, with versions for the laptop, iPad, and iPhone. It's tempting to let the email inbox serve as the to-do list, but that makes us too reactive to the agenda of others (There are lots of guides elsewhere to taming the email beast). Email generated tasks can be processed into a program like OmniFocus, forcing decisions about "next actions" and context. Areas of responsibility (class, research, administrative, home, etc.) can be used to set up a number of folders, which contain a series of projects (specific classes, specific projects, buy a new computer, etc.), within which any number of "actions" can be listed, with deadlines and additional resources linked as necessary. This list is reviewed and updated at least weekly. There is a vast literature on GTD software and related personal systems, but the important thing is to be able to quickly identify what needs attention, and to be able to access it anywhere. As David Allen advocates as a core principle, getting things off your mind and into a trusted system lets your mind focus on the task at hand.

Creative intellectual work, in particular, needs this kind of clarity and concentration. For reasons discussed earlier, academic work may not lend itself as well to the discipline of something like OmniFocus, and I find myself being less disciplined as the seasons of the academic calendar change. Class schedules and conference deadlines impose their own underlying series of urgent To do lists, but having a reliable system is important to resist the non-scholarly flood of demands on our time that threaten the creative space.

GTD organization means both having a system and developing habits of mind. Even in the pre-productivity software days, I would ask myself what I had done--even if just a small step--each day to advance one of my projects, and I suppose that's a typical GTD "next action" perspective. Also, even if not fully disciplined in my OmniFocus system, I find I

have absorbed the GTD mentality in the sense that I try to be ruthless in getting things off my mind if I can possibly do it at the moment they present themselves. I try to empty my email (at least into an action folder) each day, and quickly dispense with something if I can without letting it linger.

### The academic assembly-line

With that general strategy in mind, we can consider productivity tools and routines by thinking of the creative process. A linear assembly-line process oversimplifies how we work, especially in a networked context, but it helps to think about what is most useful at each stage. We gather information, form it into organized structures, and create formally published products, which are then fed back into our professional networks.

#### 1. Hunting and gathering

In the process of writing and preparing classes, we take in a huge volume of information, an intake that is both targeted and general. For both it's helpful to visualize a "personal learning network," sources of information that have been identified as likely to provide useful information, sources to whom we also contribute in our "personal teaching network." These networks combine to form communities of mutual learning and teaching, but which don't necessarily overlap.

Therefore, it's important to use social networks strategically in order to tame the information tide that confronts us. Large corporations form boards of directors to help monitor the environment, alerting them to potential threats and opportunities, and we are doing the same when we select others as members of our social networks, whether Facebook, Twitter, or on more focused services like academia.edu. (LinkedIn seems less useful for academics in general). So choose them with care. These sources then help push valuable information to us from the news and scholarly worlds, making things available that we would otherwise never have time to hunt down.

For my own media monitoring, a tablet device quickly has become an important tool. News and information feeds can be customized and browsed quickly, using products like "Zite" and Google Reader. Once we've been alerted to information, it's helpful to delay and displace reading into other dayparts with tools like "Pocket" that allow saving articles quickly in a cloud-based list for reading on whatever platform is handy (ideally a tablet). There's a Pocket icon on my web browser, and Pocket available on other services for clipping material. And, of course, the ability to quickly share what we read with our networks should be set up to be as frictionless as possible, posting useful articles to Twitter or Facebook, etc. (or further organized for our personal use with other organizing tools--below). This routine supports curation and the participatory ethic of sharing, increasing our social capital within our personal learning-teaching networks.

#### 2. Archiving and annotating

A more serious form of hunting and gathering involves the scholarly literature that we

search in feeding our own research. Most are already familiar with these kinds of searches, using online library resources. Products like "Endnote" have become important time-saving tools for maintaining bibliographies and quickly citing works while writing. After much frustration at the time wasted in chasing down copies of articles in my files, I've tried to be more systematic about archiving them electronically in Mendeley (migrating my citations from Endnote), a cloud-based application that (with the also popular Firefox-based "Zotero") allows storage, annotation, and--increasingly valuable--sharing with social media and class group features. (Other colleagues have spoken highly of "Papers," which allows similar functions). Although some have developed systems for storing Pdfs on Evernote, I've kept the formal academic archiving separate in Mendeley, saving Evernote for less formal resources (news and web clippings) gathered for projects and teaching and, of course, "everything else."

### 3. Scholarly writing

Next we produce something based on our research. Microsoft Word has become the de facto writing tool, but using an outline-based tool to help write and organize papers makes the process much more efficient. I became sold on using an outline processor early on in my career, beginning with an MD-DOS program called "MaxThink," and I've stuck with them ever since. The manual that came with that early program, even if relatively primitive, made a compelling case for its value in supporting critical thinking: synthesis, evaluation, and clear inductive and deductive reasoning. Writing from an outline up makes it easier to quickly see how a paper should best be put together, with logical flow, completeness, and hierarchical integrity (after satisfactorily organized and annotated, the entire outline is exported to Word for final clean-up).

A number of websites have reviews of various products (e.g., "About This Particular Outliner"), but I've been using the well-regarded "OmniOutliner" for OSX, and prior to that "Inspiration" (for either Mac or PC). Some writers also have adopted more visual tools, prior to the outline stage, that support "mindmapping." It's a matter of personal preference, with Inspiration, for example, being able to toggle back and forth between a mindmap and hierarchical outline view. (I used "IThoughts HD" for the iPad to organize this essay, before exporting to "WriteRoom," a simple wordprocessor I've been trying out because I like it's full-screen green-on-black format that reminds me of the early days on my IBM AT. To finish it up I'll use Word.)

A relatively recent writing tool that I've tried is "Scrivener," which supports outlining and structure in more than one perspective and has been well reviewed in the *Chronicle of Higher Ed*. Scrivener allows the writer to assemble the raw material for an article (interviews, research articles, etc.) along with one's own writing into a saved Scrivener "project," which allows side-by-side screens and generally helps keep the relevant materials readily accessible. Once the writing is finished it can easily be exported to Word for final polishing. The important thing about outline support is that thinking is encouraged, rather than distracting the writer prematurely with decisions about fonts, margins, and other cosmetic elements which properly belong at the end of the process, not the beginning.

#### 4. Professional Promotion

Finally, there's the part about making work public and promoting it. Academics have little choice but to embrace the networked world, especially in giving some thought to their "online professional presence," and there are a number of resources available for guidance. No one template will work for everyone, but the visibility that allows one to participate effectively in the professional world means keeping published work and professional activities easily findable online. At the least, a personal-professional website helps archive publications and other information and can be combined with blogsite and Twitter feed. I haven't found the best mix of these, but there are a number of tools that help consolidate one's various online feeds. At least I've tried to have a fairly comprehensive faculty site, with links to and among a more personal blogsite and class blogs. I've used Academia.edu (a public academic Facebook) as an easy way to post current papers and projects, saving the primary site for finished publications, but academia.edu can be used for that too. I'm a relatively inactive Twitter user, but I recognize that a steady presence there can bring academics to prominence as a complement to and even beyond their published work.

The online professional presence brings suggestions from others and other interaction that feeds back into all the other stages above.

#### Conclusion

I've prepared this review to support a general discussion with colleagues, so I welcome thoughts or additional recommendations. A proper system won't guarantee productivity, and indeed it's easy to get absorbed with finding the perfect system and coolest apps. But without a good workflow routine, a trusted system, and some technology-supported discipline, too much of the creative space is taken up by distractions, tedium, and wasted time looking for the needed items. Intellectual output is precious capital and needs to be captured, organized, and easily retrieved. Doing so makes creative space more available and resistant to the encroaching demands on limited attention.

(Note: This is an informal draft review prepared for a colloquium for the College of Communication on productivity strategies and related practical tools, spring semester 2013. Comments welcome.)

#### Products mentioned

- Dropbox
- EndNote
- Evernote
- Flipboard
- Inspiration
- IThoughts HD
- Mendeley

- OmniFocus
- OmniOutliner
- Papers
- Pocket
- Scrivener
- Things
- WriteRoom
- Zite
- Zotero